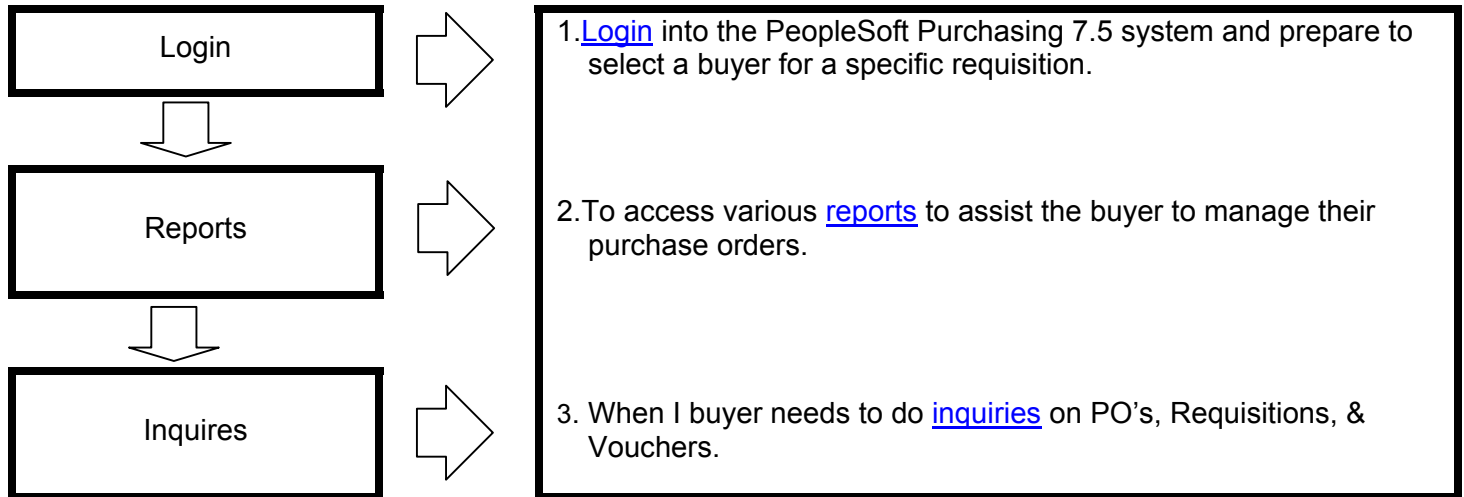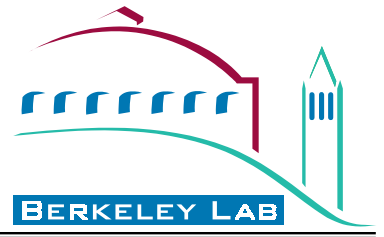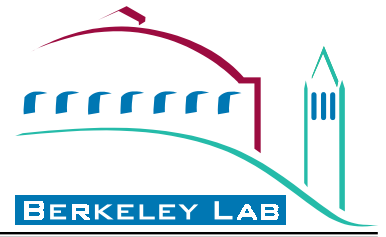# How do I manage PO's with Reports and Inquiries?

The following panels will outline how a buyer will manage their purchase orders by accessing various reports and Inquiries.

Login	1. Login into the PeopleSoft Purchasing 7.5 system and prepare to select a buyer for a specific requisition.
Reports	2. To access various reports to assist the buyer to manage their purchase orders.
Inquires	3. When I buyer needs to do inquiries on PO's, Requisitions, & Vouchers.

How do I manage PO's with Reports and Inquiries?
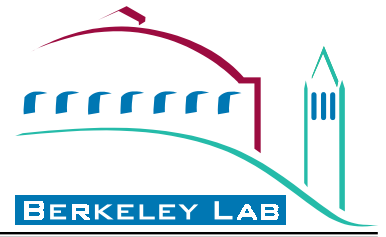
Step 1:   Login

- ➤ Launch the PeopleSoft Signon from the Novel Application launcher.
    - o   Connection type "Oracle" (Defaulted)
    - o   Database Name "FMSPRD" (Defaulted)
    - o   Enter your login name. (UPPERCASE only)
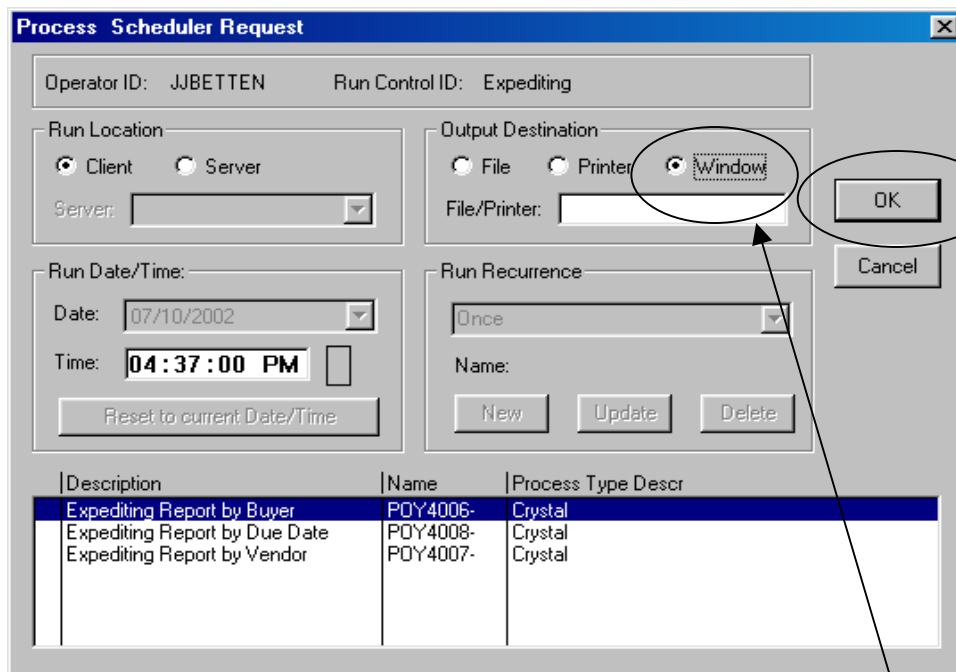   - o   Password is your login name (lowercase only)

- ➤ Click "OK"

Step 2:   Purchase Order Reports

In PeopleSoft, there are a variety of reports that operators can access. The following reports can be access through the Manage Purchase Orders report panel. Each panel has its own unique set of parameters. Each report has up to several variations of the specific report that can be processed. Each report is delivered in a Crystal format.

All Reports begin with the selection of the specific report and defining a run control and clicking the run button.

The Process Scheduler Request will display.

On all Crystal reports, select the radio button next to the Output Destination of **Window**.

If the report has several options to select, click on the one you want to run and click **OK**.
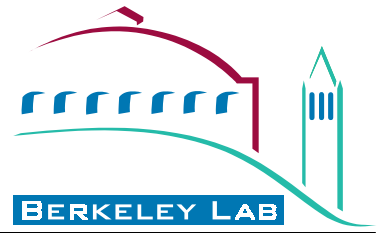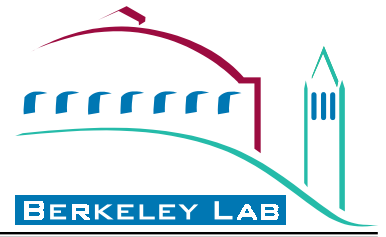
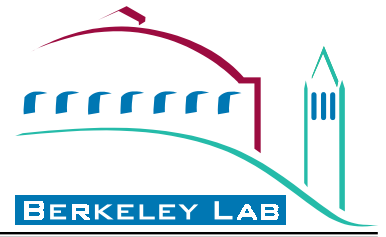| Report ID	Report Name	Description
POPO005	Purchase Order	This is the purchase order used to communicate with suppliers.
PORFQ01	Request for Quote	This Request for Quote is used to communicate with suppliers.
POY1100	Requisition to PO Cross Reference	This report provides a cross-reference of Requisition lines and associated Purchase Order lines.
POY4005	Expediting Report by PO ID	This report provides a listing of past due Purchase Orders sorted by Purchase ID.
POY4006	PO Expediting Report by Buyer	This report provides a listing of past due Purchase Orders sorted by Buyer.
POY4007	PO Expediting Report by Vendor	This report provides a listing of past due Purchase Orders sorted by Vendor.
POY4008	PO Expediting Report by Due Date	This report provides a listing of past due Purchase Orders sorted by Due Date.
POY4010	PO List By PO Date	This report displays Purchase Order header status information along with total ordered, received, and paid quantities sorted by PO Date.
POY4011	PO List By Vendor	This report displays Purchase Order header status information along with total ordered, received, and paid quantities sorted by Vendor.
POY4012	PO List By Buyer	This report displays Purchase Order header status information along with total ordered, received, and paid quantities sorted by Buyer.
POY4013	PO List By Status	This report displays Purchase Order header status information along with total ordered, received, and paid quantities sorted by PO Status.
POY4020	PO Status By Vendor	This report shows the status of Purchase Orders, including ordered, received, and paid quantities and amounts sorted by Vendor.
POY4021	PO Status By Item	This report shows the status of Purchase Orders, including ordered, received, and paid quantities and amounts sorted by Item ID.
POY4030	PO Detail By PO Date	This report is for use in conjunction with the Purchase Order Listing reports, which contain only header information. This report lists Purchase Order line information including Item ID and quantity, category, manufacturer, lead time, and contract information sorted by PO date.

Report ID	Report Name	Description
POY4031	PO Detail By Vendor	This report is for use in conjunction with the Purchase Order Listing reports, which contain only header information. This report lists Purchase Order line information including Item ID and quantity, category, manufacturer, lead time, and contract information sorted by Vendor.
POY4032	PO Detail By Buyer	This report is for use in conjunction with the Purchase Order Listing reports, which contain only header information. This report lists Purchase Order line information including Item ID and quantity, category, manufacturer, lead time, and contract information sorted by buyer.
POY4040	PO Schedule By PO Date	This report shows schedule information for Item IDs and shipping quantities, including ship to locations, FOB, and other shipping information sorted by PO date.
POY4041	PO Schedule By Vendor	This report shows schedule information for Item IDs and shipping quantities, including ship to locations, FOB, and other shipping information sorted by vendor.
POY4042	PO Schedule By Buyer	This report shows schedule information for Item IDs and shipping quantities, including ship to locations, FOB, and other shipping information sorted by Buyer.
POY4050	Sourcing Analysis by Process Instance	This report lists errors from the Autoselect process by process instance.
POY4100	PO to Requisition Cross Reference	This report provides a cross reference of PO lines and associated requisition lines.
POY5001	Receiver Summary	This report provides a summary listing of receipts within a specified date range.
POY5010	Receiver Ship To Detail	This report provides a summary listing of receipts shipments within a specified date range.
POY5020	Receiver Account Detail	This report provides a summary listing of receipts with account distribution.
POY5030	Receiver Delivery Detail	This reports provides a detail list of shipments by receiver ID.
POY5035	Shop Floor Receipt Delivery	This report provides a detail list of shop floor receipts.
POY6100	RFQ to Requisition Cross Reference	This report provides a cross-reference of RFQ lines and associated requisition lines.

Report ID	Report Name	Description
POY7000	Receipt Accrual Report	This report shows a detail summary by receiver id, Purchase Order id, quantity, price and total by line.
POY8010	Purchase Exception	This report provides a summary listing of Purchase exceptions showing amount limits per transaction.
POY8011	Purchase Exception	This report provides a summary listing of Purchase exceptions showing amount limits per month.
POY8012	Purchase Exception	This report provides a summary listing of Purchase exceptions showing the number of transactions per day.
POY8013	Purchase Exception	This report provides a summary listing of Purchase exceptions showing the number of transactions per month.
POY8014	Purchase Exception	This report lists a summary listing of Purchase exceptions showing commodity codes NOT allowed.
POY8020	Expected Credits	This report shows a summary listing of expected credits by vendor.
PORO0002	Open PO Expenses	Insert This report shows open Purchase Order distribution lines by Expense account.
PORO0003	Open PO ORG Only	Insert This report shows open Purchase Orders by Org account only.
PORO0004	Open PO Approp/ORG	Insert This report lists open Purchase Orders by Appropriation and Org.
PORO0005	Open PO Project/Grant	Insert This report lists open Purchase Orders by Projects.
POS8001	Procurement Activity Report	Insert This report retrieves budgetary amount information for Purchase Orders according to report request parameters.
POS8002	Requisition Activity Report	Insert This report retrieves budgetary amount information for Requisitions according to report request parameters.

Step 3: Inquiries

Within PeopleSoft there are several pre-defined inquiries that allow users to view Purchase Orders, Requisitions, Receivers, & Vouchers. Some of these inquiries are interlinked allowing the user to bring up multiple information from various modules. The following inquiries will show various information enabling the user to complete their assignments.

PO Activity Summary

⟹ Go
⟹ Administer Procurement
⟹ Manage Purchase Orders
⟹ Use
⟹ Inquire
⟹ PO Activity Summary
⟹ Update/Display

The PO Activity Summary will display

Type in the purchase order number or click "Search" and select the PO from the table and click **OK**.

How do I manage PO's with Reports and Inquiries?

At the PO Activity Summary panel Header Information, Vendor, PO Number, PO Status, and Line Description will be shown.

Click on the Fetch button.

The panel now shows additional information enabling the user to view the Receipt, Invoice, & Matched Information.

Click on the Information Tabs, you will access the specific module that brings over the desired information.

Receipt Information

Voucher Information

PO Accounting Entries

This inquiry panel provides a View of the Purchasing subsidiary ledgers where journal entries are created for posting to the General Ledger.

⇒ Go
⇒ Administer Procurement
⇒ Manage Purchase Orders
⇒ Use
⇒ Inquire
⇒ PO Accounting Entries

Clicking on the **"Accounting Line Scroll Button"** will bring the accounting lines to the panel window.

Change Order History

For each change order, you can review individual header, line, and schedule changes made to a Purchase Order since its initial dispatch. On each of these panels, scroll backwards from the most current version of the header, line, or schedule to the information originally dispatched**.**

⇒ Go
⇒ Administer Procurement
⇒ Manage Purchase Orders
⇒ Use
⇒ Inquire
⇒ Change History
⇒ Header Changes

How do I manage PO's with Reports and Inquiries?

Line Changes

Ship Changes

Scrolling through the panels you will view all the changes for the particular purchase order.